



1881 Landings Drive
Mountain View, CA 94043
Tel. (415) 961-3300
Fax (415) 961-3966

FAX TRANSMITTAL FORM

To: Erika Meir		From : Nancy Hill	
Company : INPUT		Date : 7/9/96	Page 1 of : 9
Tel./Location :		Subject : Assessment of SAP Services in the U.S.	
Fax Number : 961-3966			
Confidential :	Urgent :		
		File :	Chron :
		Contact :	Other :

Enclosed is INPUT's proposal of "Assessment of SAP Services in the United States." INPUT recently launched this service in Germany and we have over 30 clients signed so far.

A number of U.S. companies are already participating (Andersen, IBM, DEC, etc.) in our U.S. project.

I will call you to discuss your potential participation by July 31st at the latest. In the meantime, thank you for your consideration of our new project.

Sincerely,

Nancy Hill
(415)528-6309



Attention: Nancy Hill (415) 628-8309

INPUT[®]**SPONSORED RESEARCH PROJECT AGREEMENT**

1881 Landings Drive, Mountain View, CA 94043-0848 • Tel. (415) 961-3300 • Fax (415) 961-8968

Sponsored Research
Project Authorized:☐ **Assessment of SAP Services in the United States**
at the fee of \$9,500.Sponsorship
Deadline
July 31, 1996☐ **Presentation at Sponsor's Site**
at the fee of \$2,500 (half-day presentation); travel expenses are
additional and will be billed separately.**Amount of Order***Note: California Clients—Applicable sales tax on 25% of the purchase price will be added***Project Deliverables:** As described on reverse side of this agreement.**Terms of Payment:**

- ☐ Enclosed is my check for the above amount.
☐ Please invoice my company on purchase order number.
☐ _____ Invoice payable upon receipt
☐ Other

Terms and Conditions:

The information provided is proprietary to INPUT and under copyright protection. The Client agrees to hold as confidential all such information and control access to the information to prevent unauthorized disclosure. The information may be distributed and used only by the employees of the Client organization and at a single physical site and will not be disclosed to any other organization or person including parent, subsidiary, or affiliated organizations without prior written consent of INPUT. Authorized distribution and use of the information within the Client company must quote INPUT as the data source.

INPUT exercises its best efforts in preparation of the information under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided. INPUT reserves the right to change or modify the contents of the program in response to changing client requirements.

Authorizations:

Client:

Organization	Telephone
Name	Fax
Title	E-mail Address
Address	Accepted by INPUT:
	Name
	Title
Signature	Signature
Date	Date





Assessment of SAP Services in the United States

Sponsored Project Deliverables:

High-exposure Marketing

- Profiles of each sponsoring company posted on the World Wide Web.
- Promotion and participation in INPUT's *Buyer's Guide to SAP Services and Selected Providers in the USA*; Buyer's guide to be sent to SAP users and potential users.

Project Results

- Access research results on a continuous basis through a Web page.
- Project Report (analyzes customer satisfaction with SAP services, SAP service user and prospect requirements, implementation of SAP solutions, SAP service partners, marketing SAP services and detailed vendor profiles)
 - Two printed copies of the report
 - Internet access to electronic copy via ftp.
 - Ten printed Executive Overviews for internal use.
- Buyer's Guide to SAP Services and Selected Providers in the USA (two printed copies)

Presentations

- Attendance to INPUT's SAP Project Sponsor's Seminar
- Optional Presentation at sponsor's site (will present research results to internal or external audience).



Assessment of SAP Services in the United States



ASSESSMENT OF SAP SERVICES IN THE UNITED STATES

Benefits to Sponsors

- **Reach hundreds of potential clients:**
 - Market your capabilities to SAP customers and potential customers
 - Post your capabilities to INPUT's *SAP Services Guide* on the World Wide Web
- **Gain tactical sales advantage** by arming your sales force with relevant, current assessments of user needs and competitive offerings.
- **Develop a marketing edge** from the latest data on competition and user needs.
- **Set up alliances** with providers of complementary services and products through examining the alliances of competitors and suppliers.
- **Ensure an effective SAP investment strategy:**
 - Appraise data from prospects and users
 - Evaluate client satisfaction data
 - Identify service opportunities you should emphasise.
- **Participate in the definition and design of the research project:**
 - Specify questions
 - Specify respondents (either individually or by class)
 - Specify additional custom interviews.

Sponsor Review

On completion of the research a subsidiary report of the results will be prepared for users and prospects.

Sponsors will review this report prior to publication and have the opportunity of inserting a two-page description of their relevant capabilities in light of the research findings.

Each sponsor will be able to review their profile of capabilities prior to publication.

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Assessment of SAP Services in the United States

Who Should Sponsor this Research Project?

SAP Service providers operating in the USA market seeking to aggressively increase their business, meet prospect demand and compete effectively.

Issues Addressed

The project will target the following SAP issues:

- **Customer Satisfaction with SAP**, the value of its products and the implementation process.
- **Customer Satisfaction with SAP services** by vendor.
- **What implementation approaches for SAP products** are economic and effective, e.g. "Big Bang" versus incremental, single source versus multiple source, etc.?
- **Prospect needs for SAP services** and corresponding selection criteria.
- **What services needs are unmet** or poorly served in the USA market. What skill sets are and/or will be needed?
- **What are customer requirements for supporting SAP operations?**
- **Effectiveness of SAP Partner levels** in delivering value to clients.
- **What relationships among SAP services vendors** are effective and what do prospects want?
- **How can SAP services vendors differentiate themselves?**
- **How do SAP services firms most effectively approach the client's SAP implementation challenge?**

Scope of Project

The project focuses on the available market opportunity in the USA and identifies the multinational coverage of vendors.

Specific service and support lines to be examined include:

- Consulting
 - Business process reengineering
 - Change management
 - Business case development/project justification





Assessment of SAP Services in the United States

- Development
 - Systems integration
 - Customized development
 - Product extensions
- Tools and Products
- Support and Operations
 - Support
 - Education and training
 - Operations, processing services and outsourcing.

Comprehensive interviews will be held with IT and business line decision makers in all organizations using or planning to use SAP products in the USA.

Interviews will be held with all significant vendors in the following categories:

- SAP Logo Partners.
- SAP Hardware Partners
- SAP Technology Partners
- Other SAP Services and Product Providers

Methodology

INPUT will:

1. Consult with each sponsor to determine their unique interests which will help to shape the survey instrument and final project deliverables.
2. Develop and implement the Project Web Site (which will host INPUT's *SAP Services Guide*) and electronic communications vehicle
3. Develop and test survey questionnaires
4. Conduct survey
5. Data tabulation, analysis and posting to the Project Web site (work-in-process accessible by project sponsors)
6. Prepare project results in report format and deliver to sponsors in electronic and paper form
7. Generate *Buyer's Guide to SAP Services and Selected Providers in the USA* (Exhibit A) which includes detailed Sponsor profiles. Distribute *Buyer's Guide* to SAP clients and prospective clients.
8. Develop and post INPUT's web-based *SAP Services Guide* (accessible by SAP clients and prospective clients and Sponsors).
9. Host *SAP Project Sponsor's Seminar* - Attendees will be project Sponsors; SAP users and prospects will be invited
10. Deliver individual presentations to Sponsors as elected by sponsoring companies
11. Perform on-going maintenance of Web-based *SAP Services Guide*

INPUT 1881 Landings Drive, Mountain View, CA 94043-0848 • (415) 961-3300 • E-mail: <http://www.input.com>





Assessment of SAP Services in the United States

Deliverables

Project Sponsors will receive:

- High-Exposure Marketing
 - Profiles of Sponsor service providers will be posted to INPUT's *SAP Services Guide* on the World Wide Web.
 - Promotion and participation in INPUT's *Buyer's Guide to SAP Services and Selected Providers in the USA*, which will be sent to SAP users and potential users.
- Opportunity to Shape the Project and Access to INPUT Work-in-Process
- Project Results
 - Release of research results on a continuous basis through a Web page.
 - Includes analysis of customer satisfaction with SAP services, SAP service user and prospect requirements, implementation of SAP solutions, SAP service partners, marketing SAP services and detailed vendor profiles:
 - Two printed copies of the report (see Table of Contents, Exhibit B),
 - Internet access to electronic copy via ftp.
 - Ten printed Executive Overviews for internal use.
 - Two printed copies of INPUT's *Buyer's Guide to SAP Services and Selected Providers in the USA*.
- Presentations
 - Attendance to INPUT's *SAP Project Sponsor's Seminar* (includes presentation, results discussion and recommendations),
 - Presentation at sponsor's site - presenting research results to internal or external audience (optional for an additional fee).

Exhibit A

Proposed Table of Contents

Buyer's Guide to SAP Services and Selected Providers in the USA

- I. Overview
- II. Customer Satisfaction
- III. SAP Services Requirements - User/Prospect Perspective
- IV. Implementing SAP Solutions
- V. SAP Services Partners - User Requirements
- VI. SAP Services Vendor Capabilities Profiles

Two-page vendor capability profiles based on project survey findings





Assessment of SAP Services in the United States

Exhibit B

Proposed Project Report Contents

Volume One

- Chapter I Introduction**
 - A. Objectives
 - B. Project Scope and Definitions
 - C. Research Methodology
 - D. Report Structure
 - E. Related Reports and Research Bulletins
- Chapter II Executive Overview**
- Chapter III Customer Satisfaction with SAP Services**
 - A. Satisfaction with SAP Products and Support
 - B. Satisfaction with SAP Services
 - C. Overall Satisfaction with SAP Business Benefits
- Chapter IV User and Prospect Requirements for SAP**
 - A. Classifying User Needs
 - B. Skill Requirements
 - C. Future Needs
- Chapter V Implementation of SAP Solutions**
 - A. Selecting Implementation Approaches
 - B. Vendor Support for Implementation Models
 - C. User Implementation Experience
- Chapter VI SAP Service Partners**
 - A. User Perspective of SAP Partnering
 - B. User Requirements for SAP Support Partners
 - C. Effective Partnering Approaches
- Chapter VII Marketing SAP Services**
 - A. SAP Services Vendor Analysis
 - B. SAP Service Partner Selection Criteria
 - C. Market Positioning and Differentiation
- Appendices Research Questionnaires and other background information**

Volume II

SAP Service Provider Profiles in Standard Format

1000

1000

1000

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Assessment of SAP Services in the United States

Current Project Participants

Germany

ALLDATA
BULL AG
CompuNet Computer
Debis Systemhaus
Digital Equipment
ORBIS
OSS Consulting
Coopers and Lybrand
Autinform
Software Union
VW-Gedas
Sercon
BPS Consult
JCS Deloitte
Integrata
Partner Consult
SAP
Schitag Ernst & Young
Schmidt, Vogel & Partner Consult
Siemens Nixdorf Informations Systeme
Softlab GmbH
SRS Dresden
tele-daten-service
VW Gedas
Hewlett-Packard
IBM Deutschland
IDS Prof. Scheer GmbH
ORGA/Fiducia
Origin/PI GmbH

Research Project Fee and Schedule

The fee for participation as a sponsor of this research is \$9,500, payable in advance. The project will be conducted during the third quarter of 1996.

Project Authorization - Deadline July 31, 1996

Ensure your participation in this important research project; orders must be received by July 31, 1996. Complete the attached sponsorship form and return to INPUT by mail or FAX.

INPUT®

1921 Gallows Road, Ste. 250
Vienna, VA 22182
Tel. (703) 847-8870
Fax (703) 847-8872

FAX TRANSMITTAL FORM

Date:

6/21/96

Page: 1 of ____

To:

Nancy Hall

Co.:

cc: Wilson, Charles

Tel. No.:

Fax No.:

From:

Norm BERTHAUT 703-761-7314

Subject:

SAP CALL 6/17See Attache 1**INPUT®**

Norman J. Berthaut

norm_berthaut@input.com
http://www.input.com

1921 Gallows Road, Suite 250
Vienna, VA 22182-3900

Main (703) 347-6870
Direct (703) 761-7314
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SAN FRANCISCO • TOKYO • WASHINGTON, D.C.



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☐ MAIL LIST - SEE IIACK

CONTACT REPORT

Non Client/Prospect File: ☒ Media ☐ Financial ☐ Other _____

Contact Date: 6/17/96

PUT
Jt. Init. NB Init. ☐ INPUT office ☒ Client Office ☐ Other _____

Date Written: 6/19/96

Alexander R. Ott
Vice President
Global Partnerships701 Lee Road, Suite 200
Wayne, PA 19087
Tel: (610) 725-4549
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Internet: alexander.ott@sap-ag.deSystems,
Applications and
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Action	Info.	By When	Prog./Proj. ID
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WH WH			Begin Sales process Actp
NB			Start Research process
	CB		✓

Bob Goodwin: I met with

ALEX OTT / SAP

ALAN BRAWLT / SAP (video conference) 508-433 3074

FELIX HARMANN (?) INPUT - Germany

- Joined US in progress to discuss background, status in Germany.

The "Net" of the meeting is that Alex Ott / SAP will support the program - He can't

approve and does not want his logo on report but will encourage SAP partners to participate - He was to fax a current list of LOGO partners to BG (DONE!) for our use -

He scheduled a meeting with Felix in Germany in 2-3 weeks to discuss program show - Alex recently took over Global responsibilities for SAP partnership

We reviewed the following -

- proposal for Spec. Research project
- methodology
- Deliverables
- Questionnaire
- Status in Germany
- Background

☐ Continued over



Mail List Change Order

☐ Update ☐ Correction ☐ Deletion ☐ Addition Serial Number 171062

U.S. COMMERCIAL

 1. TYPE ☐ Vendor ☐ User ☐ Investor / Financial ☐ Media / Press ☐ Other ☐ EDI Newsletter

 2. LEVEL ☐ Executive ☐ Manager ☐ Analyst ☐ Acquisition ☐ International ☐ Other

 3. INTERESTS ☐ C/S ☐ Computer Systems ☐ Networks ☐ EC ☐ Information Services —
☐ EIS / CIS / Multimedia ☐ Other ☐ Software Products
☐ Professional Services, SI
☐ Outsourcing, Processing, Network Services
☐ Industry _____

 U.S. FEDERAL ☐ MMAR ☐ FPAP ☐ FPAW ☐ FPFA ☐ Other

 EUROPE ☐ CSPR ☐ MAAP ☐ MSSP ☐ MVPP ☐ BIPR ☐ OSPR ☐ U.S.A. ☐ Other

* No names will be added without a completed change order and program manager approval.

Program Manager Authorization _____

CONTACT REPORT

Company

SAP

Continuation

Name

ADOX OTT

We also discussed the following —

Current or Completed SAP Studies by

- skadden Group
- Grantner
- IDC

A Current Survey that SAP is doing

- Cust Sat Survey being done now
- Germany 1st time last year

He supported our plan to begin meetings with SAP partners

Designated Allen Brault for U.S. partner program - He will keep Mex in loop - Mex wants to review your effort and input to it

(1)



SAP/ALEX Ott

Cust. Sat. Survey?

- on SAP
- or SAP providers

currently doing their own Cust. Sat. Survey
from

Jennifer Schuetz → heads analyst Group

IS

C.D. - Norm Langan? media

SAP protest on the SAP web page

HTM L "Hotlink" - Non-bias

current or completed Studies

- Andersen Group } check out
- Gartner }
- IDC }

Survey.

MISSION → To help position SAP providers?

What does the SAP provider get the \$9,500?

Can't approve will Support

Analysis of SAP SERVICES providers

Confusion in User Community

- Forrester Report caused confusion

meeting in Germany / Next 2 weeks 140 implementation
providers

Surveying of Cust. Sat. Survey 3-4 years
going on now

still continue

5



Input is the process of sending out Cust Survey
in Germany 400+ customers (users)

SAP Cust. Survey → Telephone Survey
L 45 minutes

Questions - products
Support
Hardware
Documentation
Training
Partners
Importance & Satisfaction

Learned - Target Audience
1) Exec Sponsor - most - Signed Agreement
2) project mgr - closest to project
3) Random Selected user

Researcher Efficiencies
- politics - IT one answer, BA can't be different
- more than one respondent
- Motivation
- implementation
- localization
- User

i.e. practice - Grubbe R2 or R3 in 14 countries
- different results

Should we
Cost of SW / Consultants
✓ SAP implementation
✓ Client RE
✓ Resources

(b)



IT mix of Services providers
lead itself to ROI Value

1.0. Depent \$2 IT budget

AT: T \$4 IT budget

ANOTHER SLICE - Global Budget or Germany
571

Research, project proposals

Contract / standards were very Global

30 Companies; finishing interviews

Started user profiles interviews

PRICE-WATERHOUSE & ANDERSON, KPMG

One profile of SAP Services
SAP CONSULTING

BEGIN MEETINGS WITH PARTNERS CD-Korn Legant

- SAP Services
- Whilpt's Survey
- partners Survey
- MBARD Survey

~ SAP endorsed or approved

show Benefit for U.S. practice program

Keep Alex in loop as much as

overall Concept

①



Revised

PROPOSAL

You are invited to sponsor a special research project....

Evaluation of SAP Services Providers

An INPUT Special Project

SAP systems development and implementation will cost U.S. organizations \$44 Billion over the next five years. Of this, 35%, over \$15 Billion, will be spent with services companies of various types. Which companies and services can assist in the implementation process? What are their skills/capabilities and who has used them? INPUT's Evaluation of SAP Providers will answer these and other questions about who the players are and the capabilities of each. In addition, the answers will become part of an *SAP Services Guide* posted on INPUT's web page. This guide will be a resource for users looking for SAP service providers. Participating companies will have the option of hyper-linking to the web page if they desire.

Who Should Sponsor This Report?

SAP Service providers seeking to quantify SAP-related business opportunities, understand the competitive nature of the market, position current or planned services offerings, and understand user attitudes and buying motives.

- Executive Management
- Directors of Marketing
- Directors of Sales

SAP Service Users/Prospects wishing to learn the scope of vendor services, match their needs with selected vendor services practices and options, make decision on SAP selection and implementation tactics.

- Executive Management
- CIOs
- MIS Directors

4



Vendors to be Analyzed and Profiled**Logo Partners:**

Andersen Consulting

Price Waterhouse

Ernst & Young

Coopers & Lybrand

Cap Gemini America

CSC Consulting

ICS/Deloitte

Dynamic Data Solutions

KPMG

Origin Technology

Electronic Data Systems

IBM Consulting

Hewlett-Packard

Siemens Nixdorf

National Implementation Partners:

Affiliated Computer Services, Inc.

Applied Integration Systems

BSG

CCAI

CISCorp

Clarkston Potomac Group

Computer Aid

Decision Consultants

Documentation Associates

HJM Consulting

IDS Prof. Scheer

Intelligroup

Plaut Consulting, Inc.

Seltmann, Cobb & Bryant

Setac, Inc.

SPO America

Technology Solutions Co.

Additional SAP Professional Services Providers: To be determined

(9)



Information About Each Vendor Will Include:

- Contact Information
- Geographic Coverage
- Industries Served
- Years of SAP Experience
- Relationship With SAP
- SAP Services Related Revenue
- Areas of Expertise With SAP Solutions
- SAP Awards Received
- Staff Information
- Availability of Solution Centers
- Alliances
- Sample Clients
- Marketing and Sales Methodologies
- Special Strengths
- Competitors
- Challenges for 1996

Benefits to Sponsors

- Reach prospects through:
 - Distribution of a profile of your capabilities to users and prospects through an *SAP Services Guide* posted on INPUT's web page and mailed to potential prospects of your services. Each sponsor will have the opportunity to review the results of the research before preparing its profile.
 - Representation of your company in the Executive Summary and report as a sponsor of the research. The Executive Summary will be widely circulated to the media and the business community.
- Address your research and marketing objectives through participation in the definition and design of the research and project scope.
- Improve your success rate through understanding of your position and offerings compared with competitors and market requirements.
- SAP clients and prospective clients can evaluate the range of SAP service providers available to the market place as well as the skill sets of each.



- Uncover service opportunities not being covered. by your competitors.
- Understand the relationships and alliances your competitors have in place.
- Gain valuable information on potential alliance supplemental products and services.


Scope of the Project

The project will primarily cover SAP installations and vendors in the USA It will identify the multinational coverage of vendors. Also, information will be included from INPUT's German office on SAP related developments.

The research will examine the following categories of vendors:

- SAP Logo Partners - who provide SAP customers with strategic services including business case development/project justification, Business Process Reengineering direction, support and change management.
- SAP Implementation Partners - who provide SAP customers with the tools required to successfully implement SAP's software, focusing specifically on systems integration, customized development of product extensions as well as education and training.
- Other Professional Services Providers - who provide SAP related services without formalized relationships with SAP.

Types of SAP systems to be considered will include:

- Consumer Goods
 - Financial
 - Government
 - Health Care
 - High Technology
 - Human Resources
- 



- Logistics and distribution
- Manufacturing
- And more...

Issues to be Addressed Include:

- What is the market for SAP related products?
- Who are the solution providers?
- What experience do they have?
- What are their industry sector qualifications?
- What are their strengths?
- What special assets do vendors have to offer clients?

Methodology

Project start-up

All sponsors will be contacted, input sought for research directions and project scope. Issues will be defined and survey formats confirmed.

Interview Process

- Sample survey questionnaires will be developed.
- Interview pre-test will consist of five surveys completed with by sponsoring vendors. Results will be analyzed and adjustments made to correct ambiguities and inconsistencies, then the survey process will resume
- Vendor telephone interviews will be conducted to determine the characteristics of vendors' current and planned capabilities as well as their strategies and special orientation.
- Survey results will be tabulated and analyzed.

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- Preliminary survey results and findings will be presented at a regular meeting of INPUT analysts, for peer review and comment, prior to report creation and production.
- Writing of the final report.
- Production of the report.
- Thank you notes and Executive Summaries sent to all participants.
- Creation of *SAP Services Guide* profiles of sponsoring vendors for posting to the INPUT web page.

Deliverables

- Two printed copies of final report
- Electronic report copy in Word, ASCII or HTML format
- 10 Executive Overviews for internal use
- On-site presentation (subscriber option) of report highlights to internal or external audience
- "Thank You" Executive Overviews mailed to all interviewed vendors
- Subscribing Vendor profiles posted to INPUT's *SAP Services Guide* on the companies INTERNET web page
- Business Wire press release announcing report availability

Schedule

Project launch	January 3, 1996
Subscriber review	January 3, 1996 - January 22, 1996
Interview conducted	January 22, 1996 - February 15, 1996
Report creation, review, production	February 15, 1996 - March 18, 1996
Report Delivery	March 31, 1996
"Thank You" packages mailed	April 8, 1996
Development of Profiles for	
<i>SAP Services Guide</i> by Vendors	April 5, 1996 - April 15, 1996
Posting to INPUT's web page	April 15, 1996 - April 30, 1996
Hard copy of <i>SAP Services Guide</i> mailed to users and prospects	May 1, 1996



PRELIMINARY TABLE OF CONTENTS

I. Introduction

- A. Scope, Background and Purpose
- B. Methodology
- C. Report Organization
- D. Related Reports

II. Executive Overview

- A. Results of the Research
- B. Summary of Key Input Recommendations

III. SAP Spending, 1995-2000

- A. SAP Position and Strategy
- B. Projected Use of SAP Products and Services
- C. SAP Associated Software and Services Spending and Developments
- D. Competition to SAP, and its projected impact.

IV. Vendor Profiles

- SAP Logo Partners
- SAP Implementation Partners
- Other Professional Service Providers
- Other Vendors

V. Appendixes

PRELIMINARY LIST OF EXHIBITS

II. Executive Overview

- SAP Related Services Market Through 2000
- Distribution of Vendors SAP Services Related Revenue

III. SAP Spending, 1995 - 2000

- SAP - Five Year Summary of Revenue, Net Profit and Head Count
- Growth in the SAP Services Related Market
- List of SAP Competitors and Product Offerings

IV. Vendor Comparisons

- Distribution of Vendor Years of SAP Experience

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Vendor Relationships with SAP and Availability of Solution Centers
Areas of Expertise by Vendor
Distribution Completed and In Process SAP Installations by Vendor
Distribution of Industries Served
Listing of SAP Awards Recipients

V. Vendor Profiles

Listing of SAP Logo Partners
Listing of SAP National Implementation Partners
Listing of Additional SAP Professional Services Providers
Industries Served By Geographic Coverage
Distribution of Installations by Geography
Distribution of Installations by Industries Served
Vendor Staff Information
List of Sample Clients
Competition by Areas of Expertise

The market for SAP related services will be one of the hottest markets of the decade. For those who choose to play in it the competition will be fierce, but the rewards substantial. Knowing who the players are could mean the difference between success and failure. Don't be left in the dark, fax the enclosed subscription form to INPUT today.

Fax or e-mail your subscription to INPUT today
415-961-3966 or e-mail—bob_goodwin@input.com

INPUT

1881 Landings Drive, Mountain View, CA 94043

15



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Form

SENT

Sales Note

INPUT[®]

1881 Landings Drive

Mountain View, CA 94043-0848

Tel. (415) 961-3300

Fax (415) 961-3966

FAX TRANSMITTAL FORM

To: Date: 06/06/96
 Name: Alex Ott (610 725-4906
 Alan Brault (508) 433-3074
 Co.: SAP America

Confidential: ☐

Urgent: ☒

Page: 1 of 10

From: Fax No:
 Name: Bob Goodwin
 Subject: INPUT special research project on SAP Service Providers

Gentlemen,

As we discussed, I am enclosing a proposal for the research project INPUT is about to launch in the U.S., providing an evaluation of SAP Services Providers. This U.S. effort will closely parallel the INPUT project already underway in Germany, which has been sponsored by 28 organizations there (list enclosed).

INPUT would be most interested in having SAP America support for this project, both as a sponsor, and through your encouraging your logo, implementation, platform, and technology partners to participate as well.

The advantages to SAP and its partners of INPUT delivering a well-sponsored research report would include:

- High-exposure marketing through posting of sponsors' profiles in INPUT's *SAP Services Guide* on the World Wide Web.
- INPUT promotion through our *Summary Report of SAP Services for Users*, which will be sent to SAP clients and potential clients.
- Attendance at INPUT's SAP Project Sponsor's seminars and on-site presentations
- Detailed analysis of customer satisfaction with SAP services, prepared by our analysts based on intensive surveys of SAP users.



I will be in the Philadelphia area on Monday, June 17, and would be very pleased to meet with you to discuss this project in more detail. I'll contact your offices next week to see if this is convenient for you.

Sincerely,

A handwritten signature in cursive script, appearing to read "Bob", written over the printed name.

Robert Goodwin
Vice President

(415) 528-6323
bgood@input.com



ASSESSMENT OF SAP SERVICES IN THE UNITED STATES

DRAFT

Benefits to Sponsors

- **Reach hundreds of potential clients:**
 - Market your capabilities to SAP customers and potential customers
 - Post your capabilities to INPUT's *SAP Services Guide* on the World Wide Web
- **Gain tactical sales advantage** by arming your sales force with relevant, current assessments of user needs and competitive offerings.
- **Develop a marketing edge** from the latest data on competition and user needs.
- **Set up alliances** with providers of complementary services and products through examining the alliances of competitors and suppliers.
- **Ensure an effective SAP investment strategy:**
 - Appraise data from prospects and users
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 - Identify service opportunities you should emphasise.
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Sponsors will review this report prior to publication and have the opportunity of inserting a two-page description of their relevant capabilities in light of the research findings.

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Who Should Sponsor this Research Project?

SAP Service providers operating in the USA market seeking to aggressively increase their business, meet prospect demand and compete effectively.

Issues Addressed

The project will target the following SAP issues:

- Customer Satisfaction with SAP, the value of its products and the implementation process.
- Customer Satisfaction with SAP services by vendor.
- What implementation approaches for SAP products are economic and effective, e.g. "Big Bang" versus incremental, single source versus multiple source, etc.?
- Prospect needs for SAP services and corresponding selection criteria.
- What services needs are unmet or poorly served in the USA market. What skill sets are and/or will be needed?
- What are customer requirements for supporting SAP operations?
- Effectiveness of SAP Partner levels in delivering value to clients.
- What relationships among SAP services vendors are effective and what do prospects want?
- How can SAP services vendors differentiate themselves?
- How do SAP services firms most effectively approach the client's SAP implementation challenge?

Scope of Project

The project focuses on the available market opportunity in the USA. It identifies the multinational coverage of vendors. Additionally, it includes top-level information on the relevant developments in SAP markets being researched by INPUT Europe and INPUT Germany.

Specific service and support lines to be examined include:

- Consulting
 - Business process reengineering
 - Change management

1882

1. The first of the year was a very cold day.

2. The second day was a very cold day.

3. The third day was a very cold day.

4. The fourth day was a very cold day.

5. The fifth day was a very cold day.

6. The sixth day was a very cold day.

7. The seventh day was a very cold day.

8. The eighth day was a very cold day.

9. The ninth day was a very cold day.

10. The tenth day was a very cold day.

11. The eleventh day was a very cold day.

12. The twelfth day was a very cold day.

13. The thirteenth day was a very cold day.

14. The fourteenth day was a very cold day.

15. The fifteenth day was a very cold day.

16. The sixteenth day was a very cold day.

17. The seventeenth day was a very cold day.

18. The eighteenth day was a very cold day.

Assessment of SAP Services in the United States

- Development
 - Business case development/project justification
 - Systems integration
 - Customised development
- Products
 - Tools
 - Product extensions
- Support and Operations
 - Support
 - Education and training
 - Operations, processing services and outsourcing.

Comprehensive interviews will be held with IT and business line decision makers in all organizations using or planning to use SAP products in the USA.

Interviews will be held with all significant vendors in the following categories:

- SAP Logo Partners.
- SAP Hardware Partners
- SAP Technology Partners
- Other SAP Services and Product Providers

Methodology

INPUT will:

1. Consult with each sponsor to determine their unique interests which will help to shape the survey instrument and final project deliverables.
2. Develop and implement the Project Web Site (which will host INPUT's *SAP Services Guide*) and electronic communications vehicle
3. Develop and test survey questionnaires
4. Conduct survey
5. Data tabulation, analysis and posting to the Project Web site (work-in-process accessible by project sponsors)
6. Prepare project results in report format and deliver to sponsors in electronic and paper form
7. Generate *Buyer's Guide to SAP Services and Selected Providers in the USA* (Exhibit A) which includes detailed Sponsor profiles. Distribute *Buyer's Guide* to SAP clients and prospective clients.
8. Develop and post INPUT's web-based *SAP Services Guide* (accessible by SAP clients and prospective clients and Sponsors).





Exhibit A

Proposed Table of Contents

Buyer's Guide to SAP Services and Selected Providers in the USA

- I. Overview
- II. Customer Satisfaction
- III. SAP Services Requirements - User/Prospect Perspective
- IV. Implementing SAP Solutions
- V. SAP Services Partners - User Requirements
- VI. SAP Services Vendor Capabilities Profiles
Two-page vendor capability profiles based on project survey findings



Exhibit B

Proposed Project Report Contents

Volume One

Chapter I Introduction

- A. Objectives
- B. Project Scope and Definitions
- C. Research Methodology
- D. Report Structure
- E. Related Reports and Research Bulletins

Chapter II Executive Overview

Chapter III Customer Satisfaction with SAP Services

- A. Satisfaction with SAP Products and Support
- B. Satisfaction with SAP Services
- C. Overall Satisfaction with SAP Business Benefits

Chapter IV User and Prospect Requirements for SAP

- A. Classifying User Needs
- B. Skill Requirements
- C. Future Needs

Chapter V Implementation of SAP Solutions

- A. Selecting Implementation Approaches
- B. Vendor Support for Implementation Models
- C. User Implementation Experience

Chapter VI SAP Service Partners

- A. User Perspective of SAP Partnering
- B. User Requirements for SAP Support Partners
- C. Effective Partnering Approaches

Chapter VII Marketing SAP Services

- A. SAP Services Vendor Analysis
- B. SAP Service Partner Selection Criteria
- C. Market Positioning and Differentiation

Appendices Research Questionnaires and other background information

Volume II

SAP Service Provider Profiles

*(Enhanced Version of SI Program
Vendor Analysis Report)*



Current Project Participants**Germany**

ALLDATA
BULL AG
CompuNet Computer
Debis Systemhaus
Digital Equipment
ORBIS
OSS Consulting
Coopers and Lybrand
Autinform
Software Union
VW-Gedas
Sercon
BPS Consult
JCS Deloitte
Integrata
Partner Consult
SAP
Schitag Ernst & Young
Schmidt, Vogel & Partner Consult
Siemens Nixdorf Informations Systeme
Softlab GmbH
SRS Dresden
tele-daten-service
VW Gedas
Hewlett-Packard
IBM Deutschland
IDS Prof. Scheer GmbH
ORGA/Fiducia
Origin/PI GmbH

DRAFT

Research Project Fee and Schedule

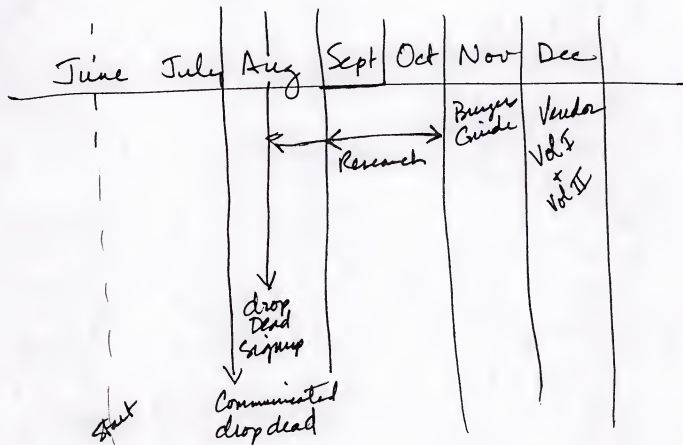
The fee for participation as a sponsor of this research is \$9,500 payable in advance. The project will be conducted during the third quarter of 1996.

Project Authorization

Ensure your Participation in this important research project. Complete the attached sponsorship form and return to INPUT by mail or FAX.



Timeline





Tactical Background

→ Users facing a monolithic implementation process - then vendors must know what their prospects are thinking

→ How are you positioned

Strategic → What are market gaps

Tactical → High Exposure Marketing - Improve your position in the market

Positioning

→ Not an 'SAP Market Report'

→ New distribution Channel

→ User Centric Approach

→ How to ~~make~~ increase revenue



INPUT®

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Fax (703) 847-6872

FAX TRANSMITTAL FORM

Date:

6/21/96Page: 1 of

To:

Nancy Holt Randall

Co.:

cc: Wilson, Charles

Tel. No.:

Fax No.:

From:

Norm BERTHAUT 703-761-7314

Subject:

SAP Call 6/17See Attache 1

- current project participants
(up to 30 companies according to Fork)

- German Questionnaire (translated
into English)

INPUT®

Norman J. Berthaut

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INPUT*Assessment of SAP Services in the United States***Current Project Participants****Germany**

ALLDATA
BULL AG
CompuNet Computer
Debis Systemhaus
Digital Equipment
ORBIS
OSS Consulting
Coopers and Lybrand
Autinform
Software Union
VW-Gedas
Sercon
BPS Consult
/ JCS Deloitte
Integrata
Partner Consult
SAP
Schitag Ernst & Young
Schmidt, Vogel & Partner Consult
Siemens Nixdorf Informations Systeme
Softlab GmbH
SRS Dresden
tele-daten-service
VW Gedas
Hewlett-Packard
IBM Deutschland
IDS Prof. Scheer GmbH
ORGA/Fiducia
Origin/PI GmbH

DRAFT**Research Project Fee and Schedule**

The fee for participation as a sponsor of this research is \$9,500 payable in advance. The project will be conducted during the third quarter of 1996.

Project Authorization

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**User Questionnaire - "Evaluation of the
Leading SAP Services Provider - Germany"**

INPUT is a comprehensive, leading market research and consulting firm specializing in IT software and services.

All interviewed businesses will be treated with absolute confidentiality, and all responses securely maintained. The statements will be considered exclusively and will not be made available to other project participants.

Name of the business _____
Contact _____
Position _____
Date of interview _____

Questions

1a) How many workers did your business employ in 1995? _____

1b) What was the amount of your sales in 1995? _____

1c) What was the amount of your data processing budget in 1995?

1d) What type is your business?

Industrial _____ Maintenance Supplier _____ Transportation _____
Agriculture/Farming/Forestry _____ Wholesale _____
Retail _____ Health Services _____ Telecommunications _____
Insurance _____ Banking/Finance _____ Service-related _____
Training/Instruction _____ Civil Service _____



Questionnaire --2

2) Which SAP software is installed in your business?

R/2 _____

R/3 _____

3) Which SAP modules are installed in your business?

R/2: RP _____

RM _____

RF _____

RM/PPS _____

RK _____

RV _____

R/3: HR _____

MM _____

FI _____

PP _____

CO _____

SD _____

Others _____

4) How many people have access to the system? _____



Questionnaire --3

5) Which external service providers were involved?

- In the decision process _____ (NAME)
- In the planning _____ (NAME)
- In the implementation _____ (NAME)
- In the operation of the system (outsourcing)
_____ (NAME)

**6) Who has authority to select external SAP service providers/
consultants?**

Management _____ Data Processing Department _____
Controller _____ Special Department _____

Comments _____

**7a) What was your expenditure for external SAP-related service
providers for 1995? _____**



Questionnaire --4

7b) How was this budget appropriated (approximately)?

• Training	_____ %
• Organizational consultation	_____ %
• Data processing-related consultation	_____ %
• Implementation/adaptation	_____ %
• Maintenance	_____ %
• System operation	_____ %
TOTAL	100%



Questionnaire -- 5

8) How important were the following criteria in the selection of the external service provider/consultant?

	<u>Very Important</u>			<u>Unimportant</u>	
	1	2	3	4	5
Comprehensive service support	—	—	—	—	—
Capability of suppliers	—	—	—	—	—
Internal references	—	—	—	—	—
External references	—	—	—	—	—
Department knowledgeability	—	—	—	—	—
Location proximity (site)	—	—	—	—	—
International presence	—	—	—	—	—
Proficiency in the integration of complementary applications	—	—	—	—	—
Price comparative to performance	—	—	—	—	—
Reputation of the suppliers	—	—	—	—	—
Knowledge of competing products/modules	—	—	—	—	—
Other	—	—	—	—	—
	—	—	—	—	—
	—	—	—	—	—

Industry
Sector
(know how) →

Competition
Application



Questionnaire -- 6

- 9) What expectations do you have of the SAP service provider/consultant?

- 10) How important to you are the following proficiencies of a SAP service provider/consultant?

		<u>Very Important</u>			<u>Unimportant</u>	
		1	2	3	4	5
<i>professional skills</i>	Competence of the consultation	—	—	—	—	—
<i>industry knowledge</i>	Adherence to the cost-structure	—	—	—	—	—
<i>responsiveness</i>	Adherence to the time-frame	—	—	—	—	—
<i>availability</i>	Availability of personnel	—	—	—	—	—
<i>SAP SP</i>	Quality of training	—	—	—	—	—
<i>integration</i>	Cooperativeness/ preparedness of personnel	—	—	—	—	—
<i>infrastructure or service provider skills</i>	Infrastructural networking of the SAP software	—	—	—	—	—
<i>knowledge of SAP SW</i>	Operation of the system (outsourcing)	—	—	—	—	—
	Other	—	—	—	—	—
Comments						



Questionnaire - 7

11) How satisfied were/are you with regard to the proficiencies of your SAP service provider/consultant?

	Very Satisfied			Not Satisfied	
	1	2	3	4	5
Competence of the consultation	—	—	—	—	—
Adherence to the cost-structure	—	—	—	—	—
Adherence to the time-frame	—	—	—	—	—
Availability of personnel	—	—	—	—	—
Quality of training	—	—	—	—	—
Cooperativeness/ preparedness of personnel	—	—	—	—	—
Infrastructural networking of the SAP software	—	—	—	—	—
Operation of the system (outsourcing)	—	—	—	—	—
Other	—	—	—	—	—

Comments



Questionnaire -- 8

12) With which service provider were you particularly satisfied?

Why?

13) With what were you specifically unsatisfied?

- Project process too brief ____

Comments _____

- Planning process too long ____

Comments _____

- Lack of organizational structure ____

Comments _____

- Too little experience in the special field ____

Comments _____



Questionnaire -- 9

13) -- Continued --

- Insufficient training ____

Comments _____

- Shortage of qualified consultants ____

Comments _____

- Frequent replacement of project leader ____

Comments _____

- Frequent replacement of the consultant ____

Comments _____

- Other _____

- Other _____

- Other _____



Questionnaire -- 10

14) (Only R/2 or "mixed" users need respond)

a) Is a partial/complete conversion to the R/3 planned?

Yes _____ No _____

b) If so, when will this conversion occur? _____

c) Which external service providers will you contact for the conversion?

SAP _____ LOGO Partner _____ R/3 Systemhaus _____

Leading management consultant _____

Implementation specialist _____

Other _____



Questionnaire -- II

15a) Would you consider using an external service provider
for your SAP system? Yes ____ No ____

15b) If yes, because of what factors?

Positive

Attractive price ____

Convincing achievements ____

Internal personnel problems ____

Other ____

Other ____

Negative

Too expensive ____

Too strategic ____

Heavy dependence ____

Other ____

Other ____

15c) With which SAP R/3 outsourcing supplier are you familiar?

1. _____

2. _____

3. _____

4. _____

5. _____



Questionnaire --12

16a) Name (in order of marketplace visibility) five businesses that are known as leading suppliers for SAP service providers/ consultants and assess their competitiveness and competence:

1 = very good 5 = unacceptable

Name	Rating
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____



Questionnaire -- 13

16b) Which of the following businesses are generally well-known
SAP service providers/consultants?

Comments

- | | | |
|-------------------------------|--|-------|
| • Alldata | Yes <input type="checkbox"/> No <input type="checkbox"/> Know only name <input type="checkbox"/> | _____ |
| • Autinform | Yes <input type="checkbox"/> No <input type="checkbox"/> Know only name <input type="checkbox"/> | _____ |
| • BPS Consulting | Yes <input type="checkbox"/> No <input type="checkbox"/> Know only name <input type="checkbox"/> | _____ |
| • CompuNet | Yes <input type="checkbox"/> No <input type="checkbox"/> Know only name <input type="checkbox"/> | _____ |
| • Integrata | Yes <input type="checkbox"/> No <input type="checkbox"/> Know only name <input type="checkbox"/> | _____ |
| • Orbis | Yes <input type="checkbox"/> No <input type="checkbox"/> Know only name <input type="checkbox"/> | _____ |
| • ORGA | Yes <input type="checkbox"/> No <input type="checkbox"/> Know only name <input type="checkbox"/> | _____ |
| • Origin | Yes <input type="checkbox"/> No <input type="checkbox"/> Know only name <input type="checkbox"/> | _____ |
| • OSS Consult | Yes <input type="checkbox"/> No <input type="checkbox"/> Know only name <input type="checkbox"/> | _____ |
| • Partner Consult | Yes <input type="checkbox"/> No <input type="checkbox"/> Know only name <input type="checkbox"/> | _____ |
| • Schmidt Vogel
& Partner | Yes <input type="checkbox"/> No <input type="checkbox"/> Know only name <input type="checkbox"/> | _____ |
| • Software Union/
Syseca | Yes <input type="checkbox"/> No <input type="checkbox"/> Know only name <input type="checkbox"/> | _____ |
| • Tele Daten Service
(TDS) | Yes <input type="checkbox"/> No <input type="checkbox"/> Know only name <input type="checkbox"/> | _____ |
| • YW Gedas | Yes <input type="checkbox"/> No <input type="checkbox"/> Know only name <input type="checkbox"/> | _____ |



Questionnaire -- 14

17) In the next year, what plans do you have regarding SAP?

Complete conversion to R/3 _____ Partial conversion to R/3 _____

Expansion into another functional area _____ SAP Outsourcing _____

More SAP proficiency development _____ Abandon SAP _____

*to be an expert
begin*

Other _____

Other _____

Other _____

Other _____

18) Additional comments?

Thank you very much for your cooperation!

To whom should we send the incentive? _____

